

 **360/CORE THEMES-LEADERSHIP/EXECUTIVE EVALUATION**

 The 360/Core Themes Leadership/Executive Evaluation involves examining the executive’s profile in a comprehensive and thorough manner. The 360 assessment we will be using in this process is the Leadership Practices Inventory (LPI). As part of the 360, the executive will also undergo the Drake Executive Leadership Assessment which involves completing a suite of tests, surveys and questionnaires. This includes the consultant taking a thorough personal and professional history.

Our carefully designed leadership evaluation is the result of having 35 years of experience evaluating thousands of professional managers and executives ranging from Presidents/CEOs to mid-level managers and high potential individual contributors.

Why Drake Inglesi Milardo?

\*35 years of consulting nationally and to some of the top companies: LLBEAN, Staples, Idexx Laboratories, UNUM Insurance, GTE corporation, City National Rochdale,

**360 Degree Leadership Evaluation**

A primary objective of administering a 360 Degree Evaluation is to gain a deeper understanding of the executive resulting in a detailed and practical Leadership Development Plan. An important first step in the process is to facilitate a meeting with the executive and her/his direct “boss’ to develop and agree on the “core competencies” of the executive’s current and future positions.

 *A “core competency” is defined as any factor--aptitude, skill, ability, values, personal trait/characteristic, knowledge that is essential to being successful in the position.*

The list below represents the categories that would be evaluated. The Leadership Practices Inventory (LPI) requires the executive to complete a self-rating and selected “observers”- colleagues (peers), direct reports and superiors to complete the rating forms. These forms examine a number of key leadership traits, characteristics and attributes and are completed anonymously online. With respect to the validity of the data, a minimum of ten observers from the above categories is preferred.

Once the list of “observers” have been selected to participate in the 360 Degree Evaluation, a letter is sent to each “observer” introducing our firm and asking them to participate in the 360 Leadership Evaluation. When the final list is confirmed, our office will send them a letter explaining the terms and to expect an email from Wiley Publishers where they will get a link to complete the LPI online survey.

 The 360 Degree Evaluation is always most effective when the consultant interviews each of the “observers” personally after they have completed their rating form. For those individuals not able to meet face-to-face, the consultant can use video conferencing or phone. This will enable the consultant to clarify any issues the “observers” may have had in completing the 360 rating form and to gain a deeper understanding of their relationship and assessment of the executive.

Once all of the testing documents are completed a meeting is scheduled with the executive to interpret the data and discuss any questions he/she may have concerning any aspect of the evaluation. At this meeting, the goal is to identify key developmental issues that surfaced from the Drake Leadership Assessment and the 360 LPI. A meeting is then scheduled with the executive and his/her immediate superior to review the findings and discuss any aspects of the 360 Evaluation.

 Following this review, a detailed report is written to address the key findings and provide specific recommendations that need to be addressed, as well as appropriate resources. A meeting is scheduled with the executive and his/her superior to discuss the written report and agree on any next steps.

 **Drake Executive/Leadership Assessment**

 **\*** Consultant takes a thorough personal and professional history

* Abilities and Aptitudes- (analytical & conceptual reasoning, verbal comprehension, quantitative aptitude)
* Personal Profile- (personal traits, characteristics, temperament, attributes)
* Motivational Profile- (primary needs, interests and motives)
* Emotional Intelligence Test- The MSCEIT measures one’s ability to “tune in” to their own emotions and the emotions of others and to use this data to engage in a more productive and empathic conversation and relationship).
* Psychology of Persuasion- (persuasiveness, knowing how to engage and get “buy in”)
* Leadership Style/Qualities-Hogan Leadership Survey (measures key leadership attributes and qualities)
* Communication Style- (measures a person’s primary ways they engage both verbally and behaviorally).
* Knowledge and Skills- (what the executive has learned from both their personal and professional life experiences.

\*\*Completing the above tests, surveys and questionnaires involves approximately 6-8 hours. An additional 2-3 hours for the personal/professional history.

**Core Themes Methodology**

The Core Themes Evaluation involves a comprehensive and unique four-phase methodology that results in the executive identifying his/her unique Core Themes:

*“A Core Theme is defined as being an essential value, need or interest.”*

The executive’s Core Themes act as a “compass” in guiding the executive in both their personal and professional life. All important personal and professional decisions are based on the executive’s Core Themes!

 **Phase 1** involves two critical components:

* Taking a deep and thorough personal and professional history.
* Completing a comprehensive suite of empirical assessments (Drake Leadership Evaluation)

**Phase 2** takes the executive deeper into understanding herself through a series of writing exercises and selected readings. This phase provides incredible insights for the executive relative to having a clearer grasp of who they are and how they got to be the person they have become.

**Phase 3** involves identifying the executive’s unique Core Themes-“ those unique needs, values and interests that defines the executive on both a personal and professional level.”

**Phase 4** involves identifying and having a crystal-clear understanding of the executive’s core competencies-primary skills, abilities, talents, knowledge, expertise and experience.

**Phase 5 involves immersing the executive’s Core Themes and core competencies from Phase 4 into the executive’s Leadership Development Plan.**

**The Leadership Practices Inventory (LPI) Complete Step by Step Process**

* A letter is sent to each of the “observers” explaining that the executive is undergoing a 360 Leadership Evaluation and requests to have them complete the LPI rating forms. In this letter, it will explain the consultant’s role and that the consultant will contact them to explain the terms and to expect an email from Wiley Publishers with a link to complete the online survey. Additionally, the letter will ask them to agree to be interviewed by the consultant at a later date. They will also be told that their rating forms and interview with the consultant are strictly confidential.
* Executive completes the LPI self-rating form online.
* The “observers” are contacted and given the link to complete LPI online survey.
* Executive completes the Drake Leadership/Executive Assessment.
* Consultant schedules time to conduct personal interviews with the “observers.”
* Consultant schedules personal time with the executive to examine and record the executive’s personal/professional history and review the results of the LPI and the Drake Executive/ Assessment.
* Consultant reviews and discusses results of the 360 evaluation and Drake Assessment with the executive and superior.
* Consultant writes a detailed report of the notable findings to include key developmental recommendations from the entire assessment. We then will schedule time to review the report with executive and superior and come to agreement on any actionable items that need to be addressed as part of the “Leadership Development Plan.”

**Leadership Development Plan**

Consultant and executive meet to develop a draft of the “Leadership Development Plan” and then present to the superior for input and final approval. The LDP is the bedrock of the executive’s professional development and includes realistic goals and an action plan to achieve their goals.

**Actual Deliverables (reports)**

* **Drake Leadership Evaluation**
* **MSCEIT-Emotional Intelligence Test**
* **Hogan Leadership Survey Report**
* **Core Competency Profile**
* **Executive’s unique Core Themes**
* **360 Leadership Practices Inventory Report**
* **Summary of Observer Interviews**
* **Leadership Development/Coaching Plan**